

NAVAL SUPPLY SYSTEMS COMMAND

Procurement Performance Management Assessment Program (PPMAP)

PPMAP User Manual

Version 4.0

Internet Version

INTERNET VERSION

PPMAP User Manual

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Chapter

1

Introducing PPMAP

The Procurement Performance Management Assessment Program (PPMAP) User Manual describes NAVSUP 02 and assessed activity roles and responsibilities within PPMAP. Each chapter is designed to address the activities performed by either an activity and/or NAVSUP 02. Specifically, Chapter 1 introduces the history, and the purpose of the PPMAP application. Chapter 2 helps PPMAP users log on to the World Wide Web (WWW) and explore the application. Chapter 3 guides users through the “How-To” of conducting proper assessments via PPMAP. Chapter 4 shows how to create new and change existing PPMAP documents as well as other NAVSUP specific features of PPMAP. It also explains the use the Conference feature to hold on-line conferences.

Background

PPMAP is designed to support Procurement Performance Management Assessment Program evaluations by the Commander, Naval Supply Systems Command (NAVSUP 02). Activity Assessments report on the adequacy; quality and management of personnel; contract performance; quality assurance, as well as the acquisition cost and price analysis for each activity.

PPMAP contains pre-assessment checklists and activity responses, the summary of conditions observed including findings and recommendations, activity feedback to recommendations, suggestions for improving business practices, and a list of best practices. PPMAP also has a section for holding on-line conferences, and a Guidance/Instruction Section.

PPMAP fosters a collaborative approach between the assessed activity and NAVSUP 02 for both preparation and follow through during the Activity Assessment process. PPMAP sorts and displays data by assessment area or activity for use in improving business practices at NAVSUP 02 assessed procurement activities, and for compilation of metrics.

Purpose

PPMAP provides users an on-line, paperless review and assessment tool that saves time in the preparation and follow-up of contracting activity assessments.

PPMAP creates an atmosphere where principal issues and questions can be addressed and resolved online prior to the commencement of the assessment.

PPMAP also provides an online format for the assessed activity to submit status for correcting deficiencies. PPMAP provides a unique platform for posting all public assessment data and electronically archives all activity assessments for the benefit of all assessed activities.

PPMAP contains a conference area for users to create and hold on-line conferences for discussing and resolving procurement related issues.

Getting Started

PPMAP can be accessed by NAVSUP field activities via the Internet. The NAVSUP 02 staff can access PPMAP via either Lotus Notes or the Internet. A separate PPMAP user manual describes the use of PPMAP in the Lotus Notes environment.

Internet Access

The NAVSUP Contracting Field Support Division, PPMAP Coordinator, coordinates PPMAP access. For Internet access a User ID and password are required. The PPMAP coordinator approves establishment of Internet accounts (User ID & Passwords) or Lotus Notes access for each user based on their individual roles. Requests for PPMAP access are made via the QUADS registration database found on the QUADS homepage (www.quads.navsup.navy.mil).

PPMAP Support

If you need assistance using PPMAP, please contact one of the following.

NAVSUP Contracting Field Support Division, PPMAP Coordinator

Name: Andrea Reisser (SUP22A1)
Phone: (717) 605-2735
Fax: (717) 605-4040
E-Mail: Andrea_M_Reisser@navsup.navy.mil

PPMAP Functional Project Manager

Name: Dave Buntin
Phone: (703) 679-3413
Fax: (703) 679-3401
E-Mail: dbuntin@hq.caci.com

Internet Browser Currency

PPMAP should be used with a current Internet browser. The best options are Netscape 4.06 and higher, or Internet Explorer 4.0/5.0 and higher. Some of the application functionality will not work with older browsers.

Chapter

2

Exploring PPMAP

Before working with PPMAP, you should become familiar with World Wide Web (WWW) terminology and navigation processes. If you are unfamiliar with WWW basics, refer to Appendix A for some very basic information about the Internet and the WWW.

Starting PPMAP via the World Wide Web

Double click the browser icon from your desktop to launch the application. The browser “splash” screen appears while the system is initializing. The splash screen transitions to the browser’s Homepage. The Netscape Navigator Homepage is shown in Figure 2.1.

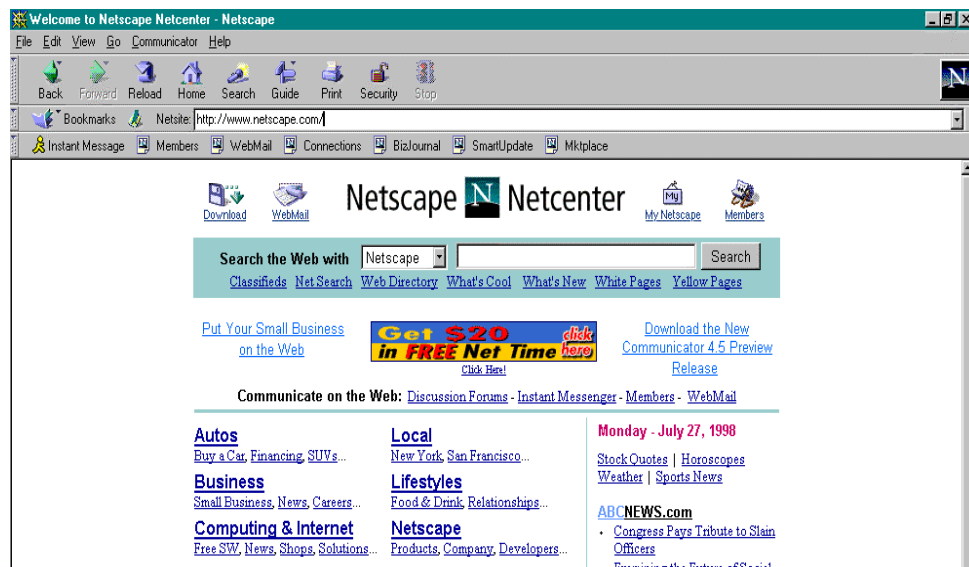


Figure 2.1 Netscape Navigator Homepage

Enter the QQuality Application and Database Suite (QUADS) Uniform Resource Locator (URL) in the location field at the top of the browser's Homepage and press enter. The QUADS URL is as follows: **<http://www.quads.navy.mil/quadhome.nsf>**. The QUADS Homepage will appear as shown at Figure 2.2.

QUADS Homepage

The QQuality Application and Database Suite (QUADS) Homepage introduces the other QUADS applications. To access the PPMAP application, select the **Assessment Processes** hotspot from the left menu as shown in Figure 2.2.



Figure 2.2 QUADS Homepage

Assessment Processes

After selecting Assessment Processes from the left menu, the Assessment Processes page will appear on the right. Select the Procurement Performance Measurement Assessment Program link as shown in Figure 2.3 to proceed.

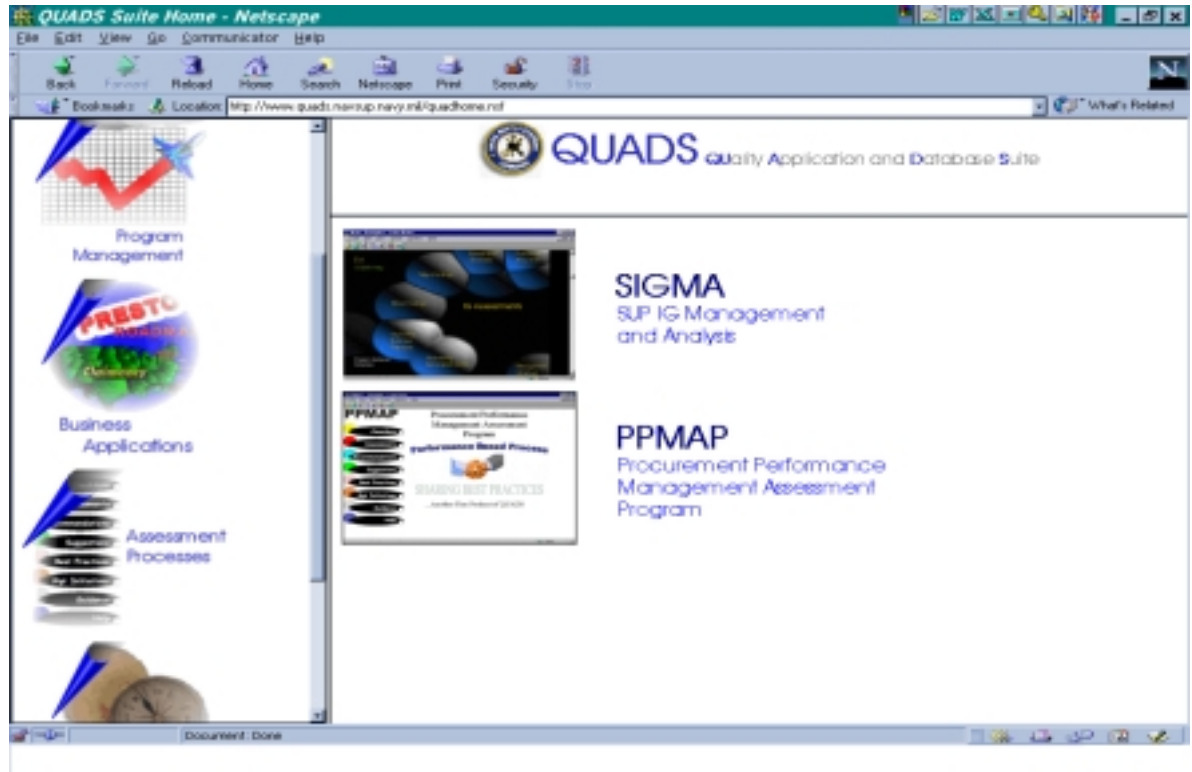


Figure 2.3 Assessment Processes Page

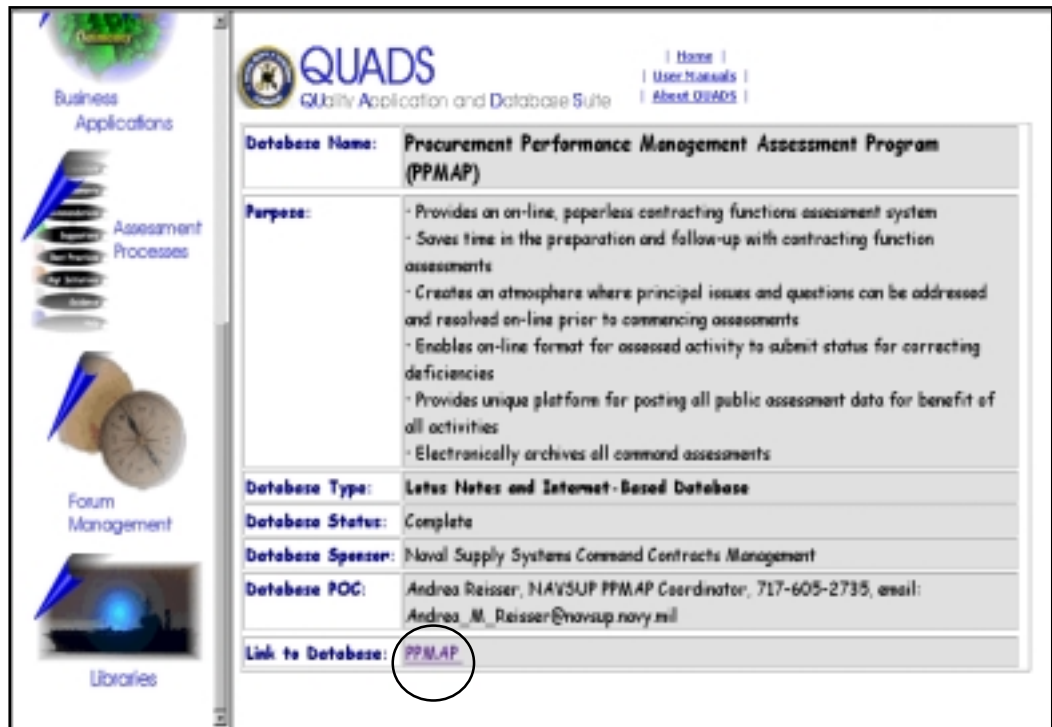


Figure 2.4 PPMAP Information Page

The PPMAP Information page, as shown in Figure 2.4, includes the database name, purpose, type, status, sponsor, and point of contact (POC). Next to the Link to Database block, select the [PPMAP](#) to access the database.

A dialog box appears in the center of the screen prompting you to enter your User ID and Password before access to PPMAP will be granted. Enter the information in the designated fields and click the **OK** button. Note that the User ID and Password are “case-sensitive”. If access to the database is repeatedly denied, contact the Database POC located as shown in Figure 2.4.

Navigating in PPMAP

Once access to PPMAP has been granted, the next screen that appears is the PPMAP Main Navigator, as shown in Figure 2.5. *All navigational activities in PPMAP begin at the Main Navigator.* The PPMAP Main Navigator is broken into ten distinct areas: Checklists, Assessments, Recommendations, Suggestions, Best Practices, Management (Mgt) Initiatives, Guidance, Help, PPMAP Admin, and Conference. These Navigators allow quick access to PPMAP sections. To access a particular PPMAP section, place the mouse pointer over the desired hotspot. A single mouse click, opens the applicable PPMAP Assessment section view. Any time you wish to return to the PPMAP Main Navigator, select the **Home** hotspot.

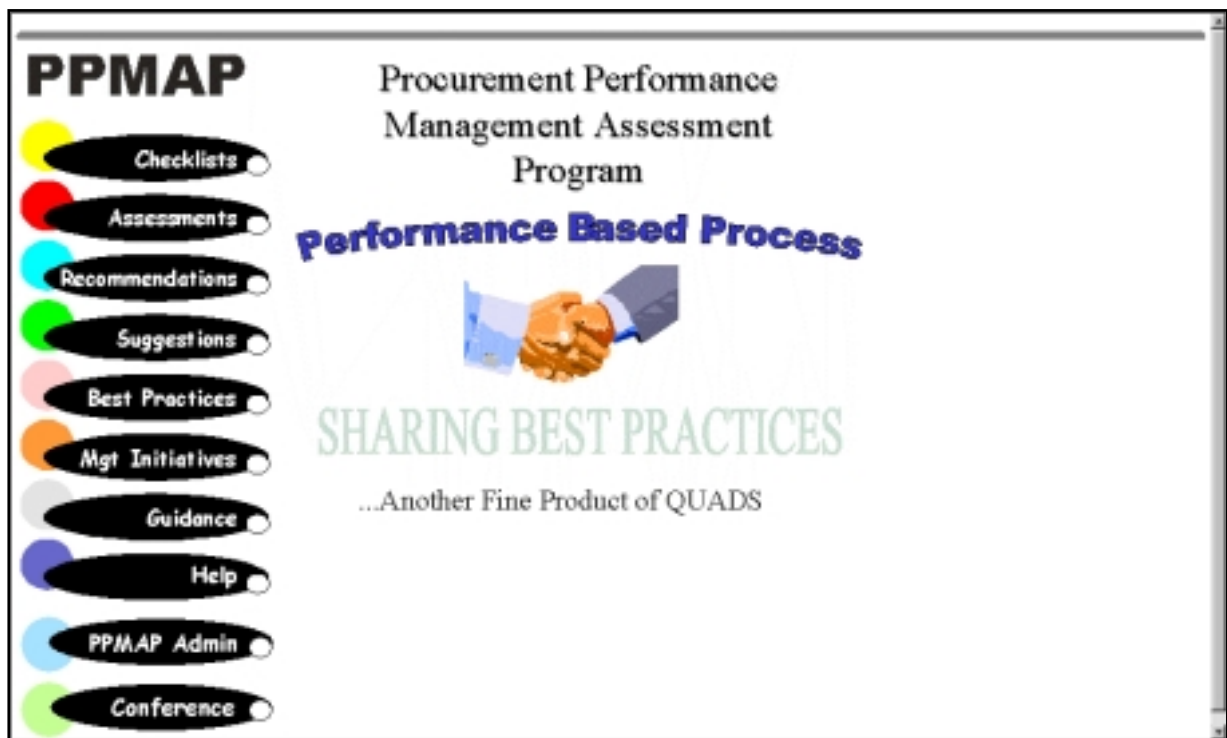


Figure 2.5 PPMAP Main Navigator & View

Navigating to Checklists

Select the **Checklists** hotspot from the PPMAP Main Navigator to access the Checklist navigator and view. The Checklist view, as shown in Figure 2.6, displays nine Assessment Areas and Pre-Assessment Letters. This view can be expanded to show the Checklists organized under each assessment area, checklist responses, comments and questions, and NAVSUP responses to the checklist responses. Within this window there are also five sort order choices available. These sort orders offer the PPMAP user the ability to view the assessment information in various formats:

- ☐ Checklists By Area
- ☐ Checklists By Name
- ☐ Responses By Date
- ☐ Responses By Name
- ☐ Responses By Type

A revised set of Checklist questions was added to PPMAP in February 2000. The old checklists are located in the view titled “1999 Checklists”. The new checklists are located in the view “2000 Checklists”, which is the default view.

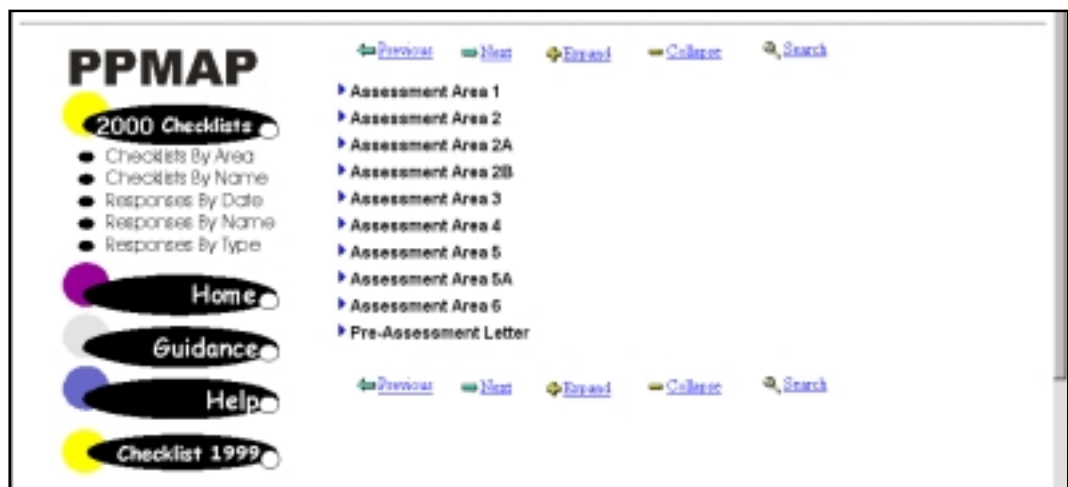


Figure 2.6 Checklist Navigator & View

NOTE:

To make sure all hierarchy levels of a document are viewed it's wise to select [+Expand](#) to reveal possible hidden levels.

Checklists By Area

Selecting the **Checklists By Area** sort order, followed by **+Expand** displays a complete list of the nine Assessment Areas with their respective checklists and Pre-Assessment Letters sorted by activity. Arranged underneath the applicable checklist may be activity checklist responses, comments and questions, and NAVSUP 02 responses.

Checklists By Name

Selecting the **Checklists By Name** sort order displays assessment checklists in alphabetical order and Pre-Assessment Letters sorted by activity.

Responses By Date

Selecting the **Responses By Date** sort order displays the response dialogue between an activity and NAVSUP 02, in date order with most recent on top. Each date is subdivided by the type of response(s) created on that day.

Responses By Name

Selecting the **Responses By Name** sort order identifies individuals by name and command who have provided checklist responses, comments and questions, or responses to checklist issues.

Responses By Type

Selecting the **Responses By Type** sort order displays checklist responses, comments, and questions, sorted first by type and then, by specific activity. This view is an excellent management tool for monitoring the percentage of checklist responses completed by a particular activity and any outstanding posted comments or questions that require NAVSUP 02 or activity action.

Navigating Home

To navigate to other areas, return to the PPMAP Main Navigator by selecting the **Home** hotspot.

Navigating to Assessments

Selecting the **Assessments** hotspot from the PPMAP Main Navigator reveals the Assessments Navigator and view, as shown in Figure 2.7. This view displays a list of assessed sites and their applicable Assessment Report(s). In this view, Assessment information is only viewable in a By Site sort order.



Figure 2.7 Assessments Navigator & View

By Site

The default **By Site** view displays the complete PPMAP report by activity. The report is organized by: Assessment Preface, Executive Summary, Summary of Recommendations, Summary of Suggestions, and Assessment Areas. Each assessment area is subdivided into: general, best practices, findings and recommendations, suggestions, and other.

Navigating Home

To navigate to other areas return to the PPMAP Main Navigator by selecting the **Home** hotspot.

Navigating to Recommendations

To access the Recommendations, select the **Recommendations** hotspot from the PPMAP Main Navigator. The Recommendations navigator and view, as shown in Figure 2.8, opens to display recommendations that result from the NAVSUP 02 assessment. The Recommendations navigator has two sort order choices available: By Assessment Area and By Site.



Figure 2.8 Recommendations Navigator & View

By Assessment Area

Select the **By Assessment Area** sort order in the Recommendations navigator panel. Select **+Expand**. This view displays NAVSUP 02's recommendations to the assessed activity grouped by assessment area. The activity is required to take action to fix or improve upon deficient area(s).

By Site

The Recommendations area defaults to the By Site sort order. This view groups NAVSUP 02 recommendations by the assessed activity. It is only necessary to select the **By Site** sort order to toggle from the By Assessment Area sort order.

Note:

PPMAP offers several ways of viewing the information contained within it. The Recommendations, Suggestions, Best Practices, Mgt Initiatives view offers two different sort orders: By Assessment Area or By Site. The default view is the By Site view.

Navigating Home

To navigate to other areas, return to the PPMAP Main Navigator by selecting the **Home** hotspot.

Navigating to Suggestions

To navigate to the Suggestions navigator and view, select the **Suggestions** hotspot from the PPMAP Main Navigator. The Suggestions navigator and view, as shown in Figure 2.9, opens to display a list of activities that have received suggestions from NAVSUP 02 on ways to improve their business operations and the activities feedback on action(s) taken. Two sort orders are available from the Suggestions navigator: By Assessment Area and By Site.

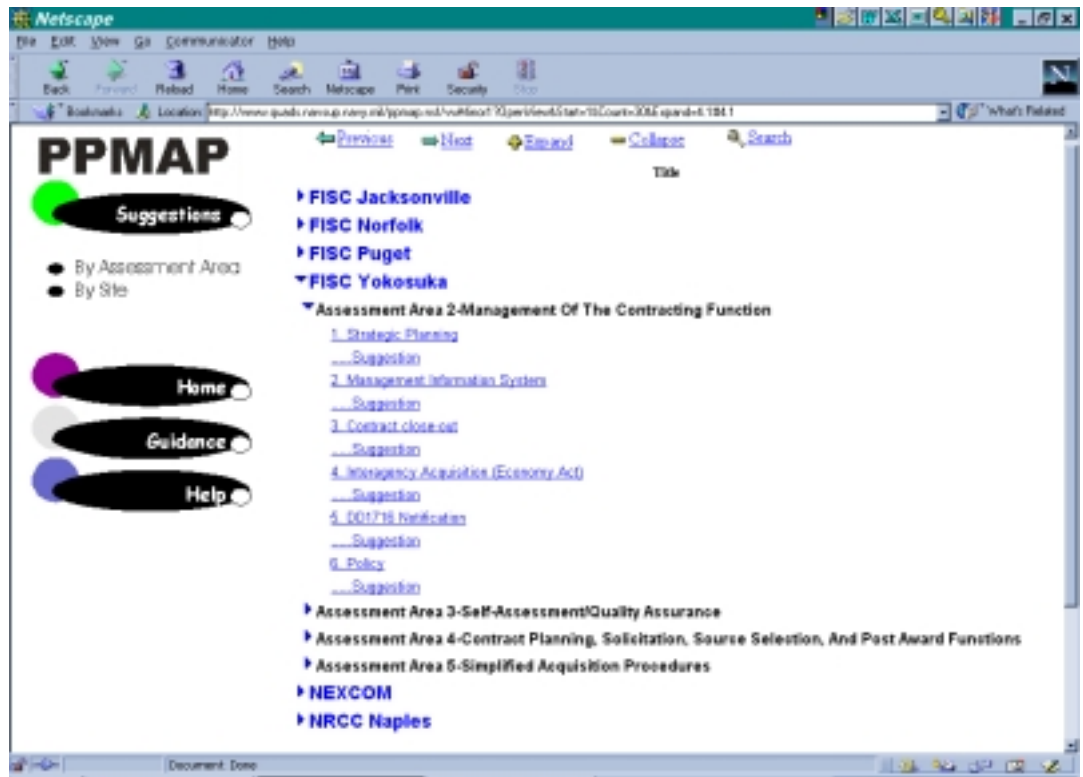


Figure 2.9 Suggestions Navigator & View

By Assessment Area

Select the Suggestions **By Assessment Area** sort order in the navigation panel. Select **+Expand**. This view displays NAVSUP 02's suggestions and activity feedback grouped within each Assessment Area.

By Site

The default Suggestions **By Site** sort order groups suggestions first within an activity; a secondary sort in the view is within Assessment Area.

Navigating to Best Practices

Select the **Best Practices** hotspot from the PPMAP Main Navigator. The Best Practices Navigator and view, as shown in Figure 2.10, opens to display a list of activities that have been identified as executing business practices that are recognized as “Noteworthy Accomplishments”. The Best Practices Navigator has two sort orders available: By Assessment Area and By Site.

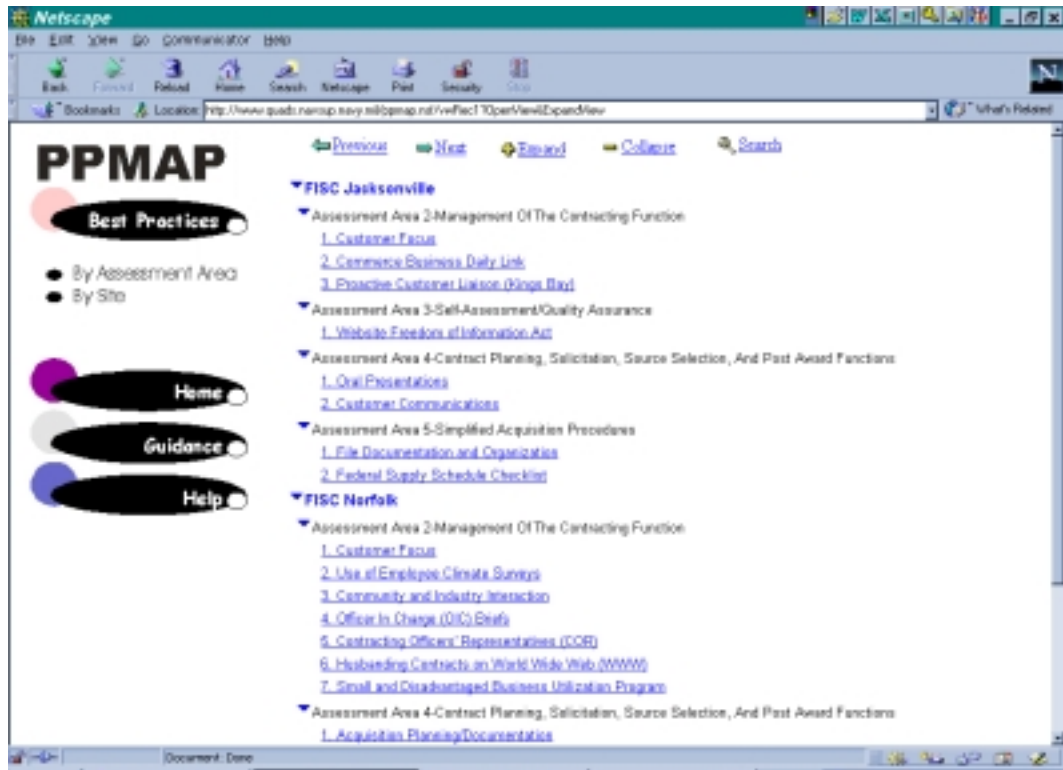


Figure 2.10 Best Practices Navigator & View

By Assessment Area

Selecting the **By Assessment Area** sort order displays the Assessment Team’s recognition of an Activity’s Best Practices grouped by Assessment Area.

By Site

The default Best Practices By Site sort order groups Best Practices by activity. To toggle back from the By Assessment Area, select the **By Site** sort order in the Best Practices navigator.

Navigating to Management (Mgt) Initiatives

To navigate to the Management (Mgt) Initiatives, select the **Mgt Initiatives** hotspot from the PPAMP Main Navigator. The view, as shown in Figure 2.11, opens to display information describing actions activities have taken that resulted in improved business operations, generated cost savings, generated cost avoidance, or other similar management initiatives. The Mgt Initiatives offers two different ways to sort the information: By Assessment Area and By Site.

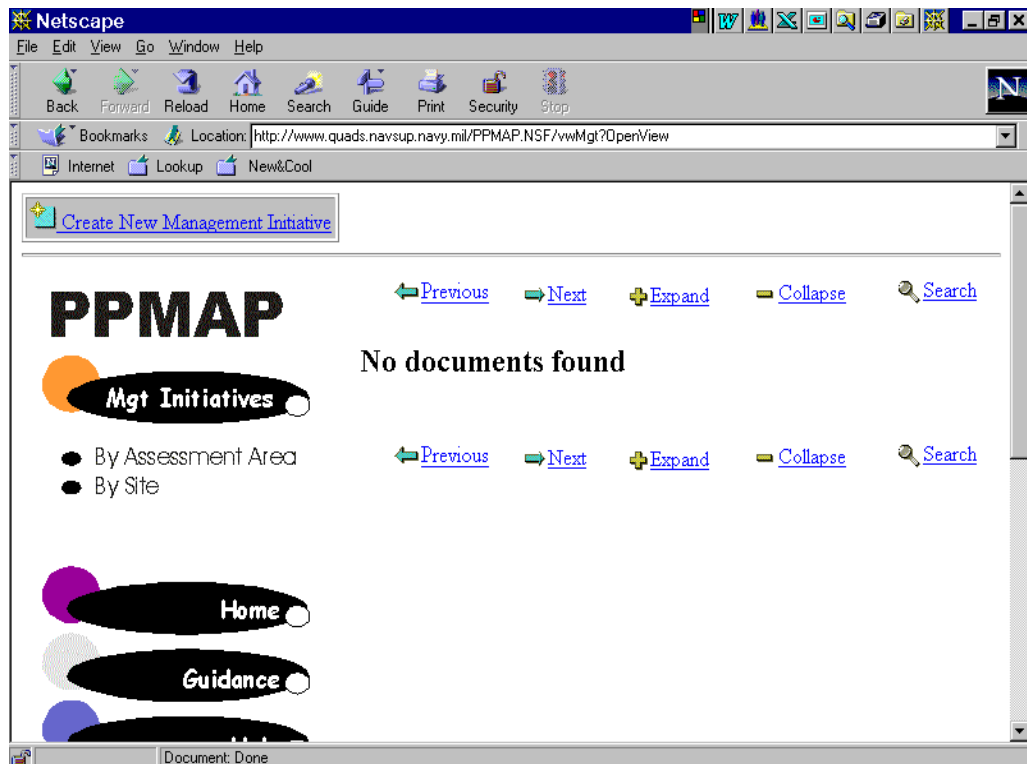


Figure 2.11 Mgt Initiatives Navigator & View

By Assessment Area

Select the **By Assessment Area** sort order in the Mgt Initiatives navigator to display specific management areas grouped within Assessment areas.

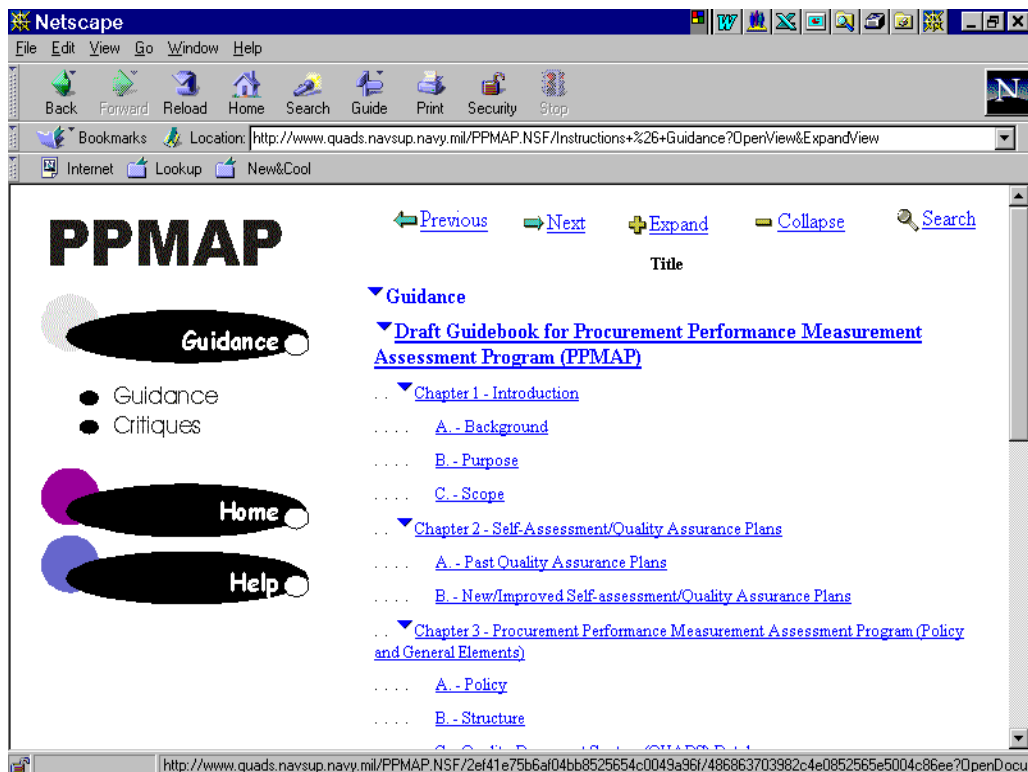
By Site

The **By Site** sort order groups management initiatives within the activity which submitted the information.

Navigating to Guidance

To access the Guidance navigator and view, as shown in Figure 2.12, select the **Guidance** hotspot from the PPMAP Main Navigator. This view displays a comprehensive guidebook specifically designed to help activities better understand the assessment process, conduct self-evaluations, and become familiar with the assessment report format. The Guidance navigator panel is divided into two distinct sections, Guidance and Critiques.

Figure 2.12 Guidance Navigator & View



Guidance

The Guidance sort order is the default, and displays pertinent Guidance by chapter and section. To toggle back from the Critiques view, select the **Guidance** hotspot from the Guidance navigator. The Guidance navigator and view can also be accessed from other PPMAP Navigator view by selecting the **Guidance** hotspot from any navigator panel.

Critiques

Select the **Critiques** sort order from the Guidance navigator to display a list of assessed activities that have provided NAVSUP 02 with feedback on the quality and professionalism of the Assessment Team and their process.

Navigating to Help

The PPMAP application provides an online version of this user manual in the Help view. To access PPMAP Help, select the **Help** hotspot from any of the PPMAP Navigator panels.

PPMAP Admin Section

The PPMAP Admin section, as shown in Figure 2-13, is used by the NAVSUP PPMAP coordinator to manage the auto email function; for archiving and accessing archived checklists; and for viewing available electronic signatures. The PPMAP Admin section is described in Chapter 4.



Figure 2.13 PPMAP Admin Section

Navigating to Conference

To open the PPMAP conference area select the **Conference** hotspot from the Main Navigator. The next screen provides help for using the conference section. At the help screen select the clasped hands in the upper right hand corner to go to the conference database. The database will appear as shown in figure 2.13.

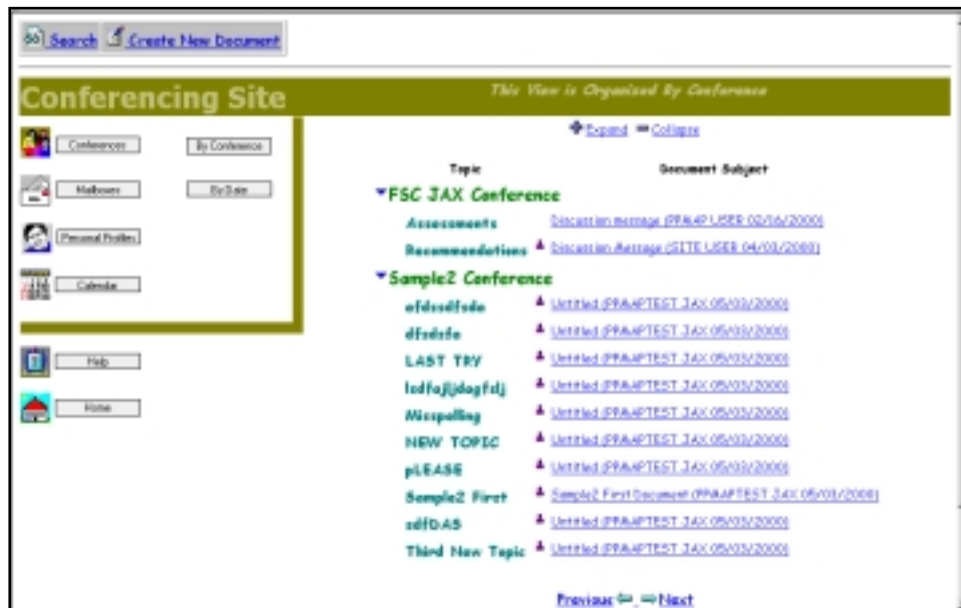


Figure 2.14 Conference

Chapter

3

Using PPMAP

Chapter 3 is designed to provide NAVSUP Headquarters and field contracting activities a paperless, user-friendly assessment process. NAVSUP 02 is responsible for generating the Pre-Assessment Letters and the actual assessment report. Activities then have the responsibility to review the Pre-Assessment Letter, to ask questions to clarify procedures, to work through various checklists to prepare for the on-site visit, to provide Implementation Status Reports (ISRs) in response to assessment report recommendations, and to provide feedback reports in response to assessment report suggestions.

Pre-Assessment Letters

The Pre-Assessment Letter is published six months before the scheduled assessment date. The letter is the kick-off document directing the “to be assessed” activity to begin preparation for the assessment. The activity will be notified via email when the Pre-Assessment Letter is posted in PPMAP. The email will provide navigation instructions for finding PPMAP on the Internet. The “to be assessed” activity reviews the Pre-Assessment Letter, responds to the assessment checklists, and prepares for the upcoming PPMAP.

Viewing Pre-Assessment Letters

Pre-Assessment Letters are visible to all PPMAP users and only accessible via the Checklist navigator and view. To view the Pre-Assessment Letter, select the **Checklists** hotspot from the PPMAP Main Navigator. In the Checklist navigator, select the **Checklists By Area** or **Checklists by Name** sort order. Select the blue triangle to the left of the Pre-Assessment Letter view to expand the view. Select the applicable site assessment letter to view its contents. Select the **Back** button to return to the Checklists view. Or select **Home** to return to the main navigator view.

Checklists

Checklist responses provide information for NAVSUP 02 to review and to gauge the health of an activity prior to the on-site visit. PPMAP categorizes the Assessment Checklists into nine Assessment areas:

- ❑ Assessment Area 1 - Mission and Organization
- ❑ Assessment Area 2 -Management of the Contracting Function
- ❑ Assessment Area 2A - PPMAP Detachment
- ❑ Assessment Area 2B - Small Disadvantaged Business Utilization (SADBU)
- ❑ Assessment Area 3 -Self-Assessment/Quality Assurance
- ❑ Assessment Area 4 - Contract Planning, Solicitation, Source Selection, and Post Award Functions
- ❑ Assessment Area 5 - Simplified Acquisition Procedures
- ❑ Assessment Area5A - Purchase Card
- ❑ Assessment Area 6 - Special Interest Items

These nine areas also correspond to the Chapter titles in the Assessment Report that is generated by the Assessment Team at the conclusion of the on-site visit. PPMAP provides the capability for NAVSUP 02 to enhance the assessment process through online interaction between NAVSUP 02 and the activity being assessed. This interaction begins with the “to be assessed” activity completing the Checklists. If they have comments or questions about a checklist, the Activity can create a comment or question form to get the additional information they need to complete the Checklist.

Viewing Checklists

There are two sets of checklists in PPMAP. They are identified by the hot spots “*2000 Checklists*” and “*Checklist 1999*”. The “*Checklist 1999*” is the original PPMAP group of checklists and it has been superceded by the “*2000 Checklists*”. The navigation instructions in this section are identical for either checklist. Assessment area checklists can be viewed: By Area or By Name.

- ❑ **By Area.** To locate a particular checklist by area, select the **Checklists** hotspot from the PPMAP Main Navigator. Select the **Checklists By Area** sort order, and then select the +**Expand** button to display the Functional Sub areas, Checklists, comments, questions, and responses. Double click on a checklist item to view its contents. Select the **Back** button from the browser toolbar to return to the Checklists By Area view. Select **Home** at the top of the view to return to the PPMAP Main Navigator View.
- ❑ **By Name.** To locate a particular checklist by name, select the **Checklists** hotspot from the PPMAP Main Navigator. Select the **Checklists By Name** sort order and select the +**Expand** button. Select the Checklist item by clicking on it to reveal its contents. Select the **Back** button to return to the

Checklists by Name view. Select **Home** at the top of the view to return to the PPMAP Main Navigator View.

Creating Checklist Comments and Questions

PPMAP provides Activity and Assessment Team personnel an interactive question and answer forum. Activities can request clarification on Checklist questions or the assessment process, and can comment on the assessment process. The Assessment Team can comment on activity's responses and answer questions online.

To create a comment or question on an assessment checklist, select the **Checklists** hotspot from the PPMAP Main Navigator. Select the **Checklists By Area** sort order, and click the applicable **Assessment Area** twisty (the blue triangle) to display the individual checklists.

Open the appropriate Checklist and select the **Create Comment/Question** button. Select the Comment or Question radio button. Summarize your thoughts in the *Key Thought* field. Add your comment or question in the *Detailed Comment or Question* area (be explicit). Select the **Submit** button to save and submit the comment or question. You will return to the Checklists view.

Note:

It is important to note that only a SINGLE click is required to submit your input. *Multiple clicking will submit the same input repeatedly.* Occasionally, if the WWW is experiencing heavy usage, the speed between your submission and the acknowledgment is slow. Please be patient and refrain from the temptation of clicking the **Submit** button again.

Comments or questions and any ensuing dialog between the Activity and NAVSUP 02 is viewable by all PPMAP users.

Viewing Responses

To view all comment or question dialog between NAVSUP 02 and an your activity, use the **Checklists By Area** view. Select the **Checklists** hotspot from the PPMAP Main Navigator. Select the **Checklists By Area** sort order, and then select the **+Expand** button to display the Functional Sub areas, Checklists, comments, questions, and site responses. Single click any link to view its contents.

PPMAP provides three ways to sort responses: **Responses By Date**, **Responses By Name**, or **Responses By Type**.

- ❑ **Responses By Date.** To identify dialogue between an activity and NAVSUP 02 on a particular date, select the **Checklists** hotspot from the PPMAP Main Navigator. Select the **Responses By Date** sort order. A list of dates displays

in descending order. Select the **+Expand** button to amplify the view. Locate and review the applicable response(s). Select **Back** to return to the Responses By Date view or **Home** to go to the main navigator.

- **Responses By Name.** To locate a particular checklist responder by name and command, select the **Checklists** hotspot from the PPMAP Main Navigator. Select the Responses **By Name** sort order. A list of names displays in alphabetical order. Select the applicable name. Select the **+Expand** button to amplify the view. Locate and review the applicable response(s). Select the **Back** button to return to the Responses By Name view or **Home** to go to the main navigator.
- **Responses By Type.** To identify a particular type of dialogue between an activity and NAVSUP 02, select the **Checklists** hotspot from the PPMAP Main Navigator. Select the **Responses By Type** sort order. A list of available Response Types displays (i.e., Checklist Response, Comment, Question, and Response to Site). Select the applicable response type. Select the **+Expand** button to amplify the view. Locate and review the applicable response(s). Select the **Back** button to return to the Responses By Type view or **Home** to go to the main navigator.

Creating Checklist Responses

To create checklist responses, select the **Checklists** hotspot from the PPMAP Main Navigator. Select the **Checklists By Area** sort order. Select the **+Expand** button to display the individual Checklists. Single click to open the applicable checklist. Select the **Create Checklist Response** button.

Answer each Checklist item by placing the cursor at the end of each question and typing a response. Select the **Submit** button from the bottom of the form to save and submit the response. You will return to the checklists view. Continue creating responses to each Checklist until all Checklists are complete. PPMAP Checklist responses are visible only to NAVSUP and the activity creating the response.

Attaching Files

After you have responded to the checklist questions, you can attach single or multiple files to checklist responses. To attach a single file scroll to the bottom of the form. You will see a long rectangle and to the right of it a Browse button. By clicking on the Browse button you can access the drive containing the file you want to attach. Clicking on the Browse button opens a small window. At the bottom ensure that the section "Files of type" is set for "All Files (*.*)". Search the directory for the file you wish to attach. When you have high-lighted the file you wish to attach and it is showing in the file name window, select the Open button. The file path name will now appear in the rectangle to the left of the Browse button.

If you wish to attach more than one file the process is a little more complex. *There are*

instructions in red to the right of the Browse button. Make sure that you select the “yes” radio button underneath the Browse button, if attaching more than one file. Make your selection for the first file you are attaching and select submit. You will get a new screen with the checklist response form, and the file you attached will now show at the bottom of the screen just above the “Submit” button. Use the Browse button to select another file and repeat the same process. When you get to the last file to attach, change the radio button selection from “yes” to “no”, and select submit.

Note:

Comments and questions are viewable by all PPMAP users. However, checklist question responses and dialog are only viewable by the activity creating the response and the PPMAP Team.

Assessments

Assessment Reports are the central part of the PPMAP database. The Assessment report showcases what the Assessment Team found noteworthy about the assessed activity (i.e., Best Practices) and what they found that requires attention (i.e., Recommendations and Suggestions).

The value of generating and maintaining an Assessment Report online is that other activities can view the report and use it as a tool to improve their current business operations. An Assessment report contains the following parts:

- ❑ **Cover Letter** - Records the assessment dates and assessment team composition.
- ❑ **Executive Summary** - Summarizes the results of the assessment in outline form. The Summary provides a quick look at what was discovered during the assessment.
- ❑ **Summary of Recommendations** - Summarizes the major discrepancies requiring remedial action.
- ❑ **Summary of Suggestions** - Summarizes suggested ways to improve practices.
- ❑ **Chapters** - There are six Chapters or nine Assessment Areas. Each chapter/assessment area in the assessment report may contain any or all of the following sections:
 - * **Section A - General** - A brief commentary on how the assessment of this area was conducted and other items the assessor wishes to include.
 - * **Section B - Best Practices** - These items are business practices identified as noteworthy by the Assessment Team during their visit.
 - * **Section C - Findings and Recommendations** - This section is the heart of the Assessment report. It provides descriptive findings on what needs to be addressed. The recommendations are actions the assessed activity is expected to take to correct the finding(s). The assessed activity is required to use the "Implementation Status Reports" form in PPMAP to detail their plan of action as well as the dates for completion. NAVSUP 02 reviews the reports and adjudicates online when all actions required to resolve the problem have been completed. *Findings and Recommendations, as well as the checklist section, are critical to the success of PPMAP.*
 - * **Section D - Suggestions** - Suggestions are non-binding ways assessed Activities can improve operations. These "infractions" are not significant enough to be classified as a Finding/Recommendation in Section C of the chapter and therefore, no formal remedial action is required. However, a "Suggestion Feedback" form is provided for

activities to report actions taken to address the deficiency noted in the Suggestion.

* **Section E - Other Items** - This area is a catchall for information that does not fit neatly in Sections A-D. “Other Items” are strictly for *information only*.

Note:

Assessment Area 6 “Special Interest Items” - This chapter section is organized differently from the rest of the chapters/assessment areas. Chapter 6 demonstrates how the assessed activity complies with a list of CNO/NAVSUP 02 Special Interest Items. Where there is action required/desired - this information should be referenced as a “recommendation” or a “suggestion” in a previous chapter according to the respective assessment area covered by that chapter.

Viewing the Assessment Report

Activities will receive an email from NAVSUP when their assessment report has been posted in PPMAP. To view the Assessment Report, select the **Assessments** hotspot from the PPMAP Main Navigator. From the Assessments view select the **+Expand** button to display all applicable subsections within the report related to a given activity. Select a section entry to display the report information. All published reports can be viewed by other activities, down to the Implementation Status Report (ISR) level. The ISR and the dialog surrounding the ISR content and resolution are kept private between NAVSUP 02 and the assessed activity.

Creating Implementation Status Reports

Each assessed activity is required to use the Implementation Status Report (ISR) form in PPMAP to communicate their “Plan of Action” for each generated recommendation. This ISR will include estimated dates for completion to correct the NAVSUP 02 findings. NAVSUP 02 reviews the report and completes the ISR status when all actions are complete.

To generate a “Plan of Action” based on an Assessment’s Findings and Recommendations, select the **Recommendations** hotspot from the PPMAP Main Navigator. From the **Recommendations** view, select the **-Collapse** button to display just the command names. Locate your command and select the blue twisty next to the name. Then select the blue twisty next to the report date. Continue in this manner to find a chapter and a Specific Recommendation entry identified in the Assessment Report. After opening the Specific Recommendation, select the **Create Implementation Status Report** button. Complete the ISR template by typing the appropriate action descriptions and expected completion date (enter date as

mm/dd/yy). Do not fill out the *PPMAP Team* section on the report. This section is designated for NAVSUP 02 during the adjudication process. Once the ISR is complete, select the **Submit** button to save and submit the ISR.

Updating Implementation Status Reports

NAVSUP 02 reviews the ISR during the adjudication process and responds by way of the “Response to Site” form. If the Assessment Team does not concur with the proposed plan of action, the activity can modify the ISR information using the “Compose Update” form. To update or change an existing ISR, select the **Recommendations** hotspot from the PPMAP Main Navigator. In the **Recommendations** view pane, locate (view might need to be expanded) and click on the appropriate ISR. When the Implementation Status Report opens, select the **Compose Update** form icon on the SmartIcons toolbar. Complete the required information on the compose update form and select submit to close and save the form. When the acknowledgment message appears, click **OK**. Select **Back** to return to the Assessments view.

Implementation Status Report Open/Completed Status

To quickly view the open or completed status of an Implementation Status Report select **Assessments** from the PPMAP Main Navigator. Locate your command assessment. On each Implementation Status Report line PPMAP will show Not-Completed or Completed.

Overdue Implementation Status Report Reminder

When the estimated completion date of the ISR is reached an email is automatically generated to the activity with a reminder that updated status is due.

Creating Suggestion Feedback

Activities have the option to respond with action taken on Suggestions. Select the **Suggestion** Hotspot on the PPMAP Main Navigator. Select the “By Site” view to ensure the Suggestions are sorted by site. Select - **Collapse** (if the right side view is not already collapsed) and highlight your command. Select + **Expand** to show all the suggestions for your command. Locate the Assessment Area and suggestion you wish to respond to and click the “suggestion” view to open. Select **Create Feedback** from the top of the form. Complete the required information on the Feedback Form. Select **Submit** to save and close the form.

Management (Mgt) Initiatives

Management Initiatives describe what actions an activity has implemented to improve business operations, generate cost savings, or generate cost avoidance, for example. The results of these actions are also documented, so other activities can view and implement similar solutions without reinventing the wheel. This area is a repository for the information activities have submitted to NAVSUP 02.

Management Initiatives do not become part of the PPMAP report. However, activities can submit initiatives to NAVSUP 02 during the assessment. At their discretion, NAVSUP 02 adds these initiatives to PPMAP. There are two ways to view Management Initiatives: By Assessment Area and By Site.

By Assessment Area

To view management initiatives by assessment area, select the **Mgt Initiatives** hotspot from the PPMAP Main Navigator. Select the **By Assessment Area** sort order. Select the **+Expand** button to display all initiatives by subject within an Assessment Area. Select any entry to display initiative information. Select **Back** to return to the Mgt Initiatives view.

By Site

To view management initiatives by site, select the **Mgt Initiatives** hotspot from the PPMAP Main Navigator. Selecting the **By Site** sort order displays a list of activities. Highlight any site, and select the **+Expand** button to amplify the view. Select the applicable subject entry to view the initiative information. Select **Back** to return to the Mgt Initiatives view.

Guidance

The Guidance view offers a comprehensive handbook that activities may use to help them understand the assessment process, conduct self evaluations, prepare for the assessment, and administer customer surveys.

NAVSUP 02 personnel create guidance documents and these guidance documents are considered to be living documents. Therefore, PPMAP offers activities the capability to comment and submit recommended changes to documents listed in the Guidance view.

Viewing Guidance

To view a guidebook within PPMAP, select the **Guidance** hotspot from the PPMAP Main Navigator. From the Guidance view, single clicks the Guidance twisty to amplify the view. Select the applicable guidebook entry to display its Table of Contents (TOC). Select **Back** to return to the Guidance view.

To view specific sections within a guidebook, select the chapter title to view a Chapter TOC or just select the Chapter subsection title to view its contents. If you choose to open the TOC view, there are links to each subsection within this view. Simply select the section title to view its contents.

Creating Comments

Activities are invited to comment on ways to improve Guidance documents. To create comments, select the applicable guidance section title. When you are viewing the text you would like to comment upon, select the **Create Comment** button. Select the appropriate comment or question radio button. Identify any key thoughts on this particular guidebook and add your comment or question as applicable. Select the **Submit** button to save the Comment or Question. Click **OK** when the acknowledgment message appears. Select **Back** to return to the Guidance book section view. Add any additional comments or questions at this time. If there is nothing further to add, select **Back** to return to the Guidance view.

Viewing Instruction Forms

Instructions are also posted in the Guidance view section under the title Instructions. To review instructions posted within PPMAP, select the **Guidance** hotspot from the PPMAP Main Navigator. From the Guidance view, click the **Instruction** twisty to display a list of all instruction forms in PPMAP. Select the applicable instruction form link to display its contents. Select **Back** to return to the Guidance view.

Critiques

NAVSUP 02 welcomes feedback from assessed activities regarding the quality and professionalism of the assessment process and assessment team. PPMAP critiques are electronic questionnaires completed by the assessed activity at the completion of each assessment. Critiques serve as a “report card” and are used to assess the performance of the Assessment Team. NAVSUP 02 will also use the information for future process improvement efforts.

Composing Critiques

To complete a critique of the Assessment Team, select the **Guidance** hotspot from the PPMAP Main Navigator. From the Guidance view, select the **Critiques** hotspot. Select the **Compose Critique** button. Complete the survey by selecting the radio buttons most applicable to the activity’s thoughts, and type any comments you have in the free form text fields. Once the form is complete, select **Submit**. When the acknowledgment message appears, click **OK** and select **Back** to return to the Guidance view.

Conference

The conferencing section allows PPMAP users to do teaming, project discussion, and task management on the web. It was created so that PPMAP users can create teams and hold discussions about almost any area affecting PPMAP or other contracting related topics. Each user can create his/her own conference, and pick team members, who are the only people that can participate in a discussion for that conference. This section also allows team members to create discussion documents and enter items into a calendar. Documents created in a conference cannot be seen by anyone who is not a member of that conference.

Creating a Conference

If you would like to create a discussion on topics of your interest, then you should first create a conference. This is done in the "All Conferences" view of the database. In creating a conference, you must choose a conference name, select team members from the current list of profiles, choose a team leader and/or a team facilitator, and enter a list of conference topics. After creating a conference, you can start a discussion for that conference. You can do this by clicking on one of the discussion views (i.e. "By Conference", "By Topic", or "By Author"), and hitting the button "Create a New Document". Upon creating a document, select your conference in the keyword field labeled "Which Conference?" Also, choose a topic and fill out the rest of the contents. The document will show up in all of the discussion views, unless you mark "Yes" in the "Put in Calendar?" keyword field.

What if the people I want to join my conference are not in the current list of profiles?

Everyone authorized PPMAP access is automatically able to participate in a conference. In other words, they will show up in the current list of profiles. If the people you want to join your conference are not listed, it means they are not registered for PPMAP access. To register for PPMAP access a prospective user must go to the QUALity Applications and Database Suite (QUADS) homepage at <http://www.quads.navsup.navy.mil>. At the homepage select "Register For a QUADS Suite Application", then select "Register Now", followed by "Request a New Account", and fill out a registration form. The request for access is reviewed by the NAVSUP PPMAP coordinator. Access authorization is provided by return email within 72 hours.

Selecting the team leader for a conference

In most cases, the person who creates the conference chooses him/herself as the team leader. The main function of a team leader is to foster the conference discussion and to alert members of a conference about important issues. Also note that any discussion document the team leader creates in his/her conference is marked with the icon of the team leader.

Calendaring Function

In order to create a calendar item, you need to create a document (just as if you were creating a discussion item) and then click on the keyword field labeled "Put in calendar?" If this field is marked "Yes", the document contents will automatically show up in the calendar. If you want the item to show up on a particular date other than the day it was created, then set the "Date to Post in Calendar" to the date you want. The date needs to be in MM/DD/YY format.

Sending A Personal Message To Someone's Mailbox

To send a personal message, create a document and select "Personal Message" in the "Communication Type" keyword field. Then select the person you want to send the message to under the "Message is Directed To:" keyword field. When you save the document, it will automatically show up in the "Mailboxes" view of the database, under the name of the person to whom the message was directed. An email will be generated notifying the individual of a personal message.

New Discussion Email Notification

Posting a new discussion in a conference automatically generates an email notification to each member of that conference.

Chapter

4

NAVSUP 02 Features

Chapter 4 is designed for NAVSUP 02 and PPMAP team use. The purpose of this chapter is threefold. First, to explain the features designed for the PPMAP team. Second, to describe the use of features that enable creation of new PPMAP documents; e.g. new checklists, new assessments, and new guidance. Third, the chapter describes the functionality in the Admin and conferencing sections. With the exception of the conferencing section, only users with PPMAP Team defined roles and system administration privileges are able to utilize and view the PPMAP features discussed in this chapter. (Most of the features unique to the PPMAP team role are not even visible to other users.)

NAVSUP 02 Responsibilities

NAVSUP 02 is responsible for creating Pre-Assessment Letters, creating checklists, corresponding with the “to be assessed” activity, generating all Procurement Performance Management Assessment reports for the assessed activity, adjudicating assessed activity responses to PPMAP report findings and recommendations, creating and updating PPMAP guidance, determining rules for use of the conference feature, and managing the Admin section.

Pre-Assessment Letters

The Pre-Assessment Letter section is co-located with the Checklists. The intention is to have electronically generated correspondence to kick-off an assessment. This eliminates the need to create hard copy.

Generating Pre-Assessment Letters

To generate a Pre-Assessment Letter, select the **Checklists** hotspot from the PPMAP Main Navigator. Select **Checklists By Area** in the Checklist navigator, and then select the **Create Pre-Assessment Letter** button at the top of the screen to start composing the letter. First, select the addressee in “Site Name” block by selecting from the pull

down menu. Type the date in MM/DD/YY format. In the text block, type the required text or use the Copy and Paste functionality offered by Windows to paste the information from another source (e.g., MS Word). When finished “composing” the letter, select a signature and click on **Submit**. You will return to the main navigator.

Note:

When the Pre-Assessment letter is saved and closed it triggers an automatically generated email notification to the activity to look in PPMAP for the letter.

Checklists

Checklists are forums for NAVSUP 02 to gauge the health of an activity by assessment areas prior to the assessment visit. PPMAP provides the capability to enhance the assessment process through online discussions between NAVSUP 02 and the “to be assessed” activity.

Creating a New Index Entry

The PPMAP checklists are arranged by existing PPMAP functional areas or “chapters”. The **Create New Index Entry** feature allows for creation of new functional areas or “chapters”. From the Checklists by Area view select **Create New Index Entry** at the top of the screen. In the form add the new Functional Area (chapter) name and if required the sub functional area. Click submit and the new chapter will be created. If you are adding a new chapter with new checklists, the new chapter must be created before attempting to create new checklists.

Creating New Checklists

To generate a New Assessment Checklist Item, select the **Checklists** hotspot from the PPMAP Main Navigator. Select the **Checklists By Area** sort order in the Checklist navigator, and then click on the blue triangle to the left of the applicable **Assessment Area**. Click once on the Blue Assessment Area title. At the next screen, select the **Create New Checklist** button.

In the Checklist form, type the Checklist number and name, select the appropriate year, and type or copy and paste in the Checklist questions in the text block provided. Select **Submit** to save the new Assessment Checklist to the applicable assessment area.

Managing Responses

Chapter 3 included a discussion of how to research and display a snapshot of comments, questions, or responses generated by an activity to NAVSUP 02. PPMAP provides the interactive means for NAVSUP 02 responses to activities.

Responding to Comments and Questions

To create a response to a checklist question or comment that an activity has generated, select the **Checklists** hotspot from the PPMAP Main Navigator. Select the desired **Responses By Date**, **Responses By Name** or **Responses By Type** sort order in the Checklist navigation panel to view responses in various sort orders. Select and double click to open and view the comment or question contents. To respond, select **Edit Document** to open the response portion of the form in *Edit* mode. Type your answer in the space provided in the Response section at the bottom of the form. Select **Submit** to save the response. Then select one of the navigators (Home, Guidance View, Checklists View) to continue working.

Responding to Checklist Responses

When reviewing activity checklist responses the NAVSUP 02 action code may determine that additional information is desired relative to the questions on that particular checklist. To create a response to a checklist response, open the applicable checklist response form, then select **Create Response to Site**. Fill-in the **Response to Site** form. Select **Submit** to save and close. You will return to the checklists by assessment area view.

Assessments

Assessment Reports are a central part of the PPMAP database. The “Assessment” navigator in the main navigator screen takes you to the Assessment view. This view contains the complete PPMAP report for each command shown.

The value of generating and maintaining an Assessment Report online is that other activities can view the reports and use them as a tool to improve their current business operations. NAVSUP 02 personnel create the Assessment reports in PPMAP.

An Assessment Report contains the following parts:

- ❑ **Cover Letter** - Very general information on the assessment result and instruction to the site.
- ❑ **Executive Summary** - Summarizes the results of the assessment in outline form. The Summary provides a quick look at the highlights of the assessment.
- ❑ **Summary of Recommendations** - Summarizes the major discrepancies requiring remedial action.
- ❑ **Summary of Suggestions** - Summarizes suggested ways to improve business practices.
- ❑ **Chapters** - There are six Chapters or nine Assessment Areas. (*Assessment Areas/Chapters are identified in the Checklist discussion area of Chapter 3 of this manual.*) Each chapter/assessment area in the assessment report may contain any or all of the following sections:
 - * **Section A - General** - Provides a brief commentary on how the assessment of the area was conducted and other items the assessor wishes to include.
 - * **Section B - Best Practices** - These items are business practices identified by the Assessment Team during their visit that are recognized to be noteworthy.
 - * **Section C - Findings and Recommendations** - This section is the heart of an Assessment report. It provides descriptive findings on processes or procedures requiring command attention. The recommendations that are part of each finding are actions the assessed activity is expected to take to correct the finding. The assessed activity is required to use the Implementation Status Reports form in PPMAP to provide their plan of action and milestones for completion. NAVSUP 02 reviews the reports and adjudicates online when all actions have been completed to fix the problem.
 - * **Section D - Suggestions** - Suggestions are non-binding ways assessed Activities can improve operations. These “infractions” are

not significant enough to be classified as a Finding/Recommendation in Section C of the chapter. However, a “suggestion feedback” form is submitted by the assessed activity explaining action taken in reaction to each “suggestion”.

- * **Section E - Other Items** - This area is for information that does not fit neatly in Sections A-D. This information is strictly for information only.

Note:

Assessment Area 6 “Special Interest Items” - This chapter section is organized differently from the rest of the chapters/assessment areas. Chapter 6 demonstrates how the assessed activity complies with a list of CNO/NAVSUP 02 Special Interest Items. Where there is action required/desired - this information should be referenced as a “recommendation” or a “suggestion” in a previous chapter according to the respective assessment area covered by that chapter.

Creating the Cover Letter

Creating an assessment report begins with creation of the cover letter. All remaining sections of an assessment are created from action buttons in the cover letter.

To generate the Assessment Report Cover Letter, select the **Assessments** hotspot from the PPMAP Main Navigator. From the Assessments view, select the **Create Cover Letter** button. A new view will open for the cover letter. Select the Site Name from the pull down menu. Type the date using MM/DD/YY format. Type or paste in from another document the cover letter text, select a signature, and select **Submit** to save the cover letter for the assessment being created. The screen will change and the cover letter will reappear in a new format. Across the top of the screen will be buttons for creating the: executive summary, summary of recommendations, summary of suggestions, and each assessment chapter. In addition there is a button titled “notify site”. This button is used to trigger an automatically generated email to the site *after* the assessment report has been loaded.

Creating the Executive Summary

The Executive Summary cannot be created until the Cover letter has been created in PPMAP. After the Cover Letter has been created, select the **Create Executive Summary** button, enter the required information in the appropriate fields and select **Submit** to save the Executive Summary. After the Executive Summary is saved you will return to the Cover Letter view.

Creating the Summary of Recommendations

The Summary of Recommendations can not be created until the Cover Letter has been entered in PPMAP. After the Cover Letter has been generated, select the **Create Summary of Recommendations** button in the Cover Letter view, and enter the required information. Select **Submit** and the Summary of Recommendations will be saved. After the Summary of Recommendations is saved you will return to the Cover Letter view.

Creating the Summary of Suggestions

The Summary of Suggestions section can only be added after the Assessment Report Cover Letter has been created. After the Cover Letter has been generated, select the **Create Summary of Suggestions** button in the Cover Letter view, and enter the required information. Select **Submit** and the Summary of Suggestions will be saved. After the Summary of Suggestions is saved you will return to the Cover Letter view.

Creating Chapters and Chapter Sections

The chapters and chapter sections can only be added after the Assessment Report Cover Letter has been created. Select the **Create Assessment Chapter** button in the Cover Letter view. Select the appropriate Chapter Title from the pull down menu. Enter the applicable text. This is usually Part A "General" of the assessment report chapter. When all information is added, select **Submit**. The chapter information will be saved and the screen will change to show additional buttons: Edit document; create best practices (section b); create recommendations (section c); create suggestions (section d), and create other (section e).

Creating Best Practices

The Best Practices cannot be created until a Chapter section has been entered in PPMAP. In the specific chapter view select **Create Best Practices** and the screen for entering each Best Practice will open. Select section letter B, enter the title of the Best Practice, and enter the description of the Best Practice in the large block. When finished select **Submit**. The Best Practice form will be saved and you will return to the chapter screen. To enter another Best Practice, select **Create Best Practices** again and continue creating a separate form for each Best Practice until all of the Best Practices for that chapter have been loaded.

Creating a Finding

The Findings cannot be created until a Chapter section has been entered in PPMAP. In the specific chapter view select **Create Findings** and the screen for entering each **Finding** will open. Select section letter C, enter the title of the Finding, and enter the description of the Finding in the large block. When finished select **Submit**. The **Finding** form will be saved and reopen with two new buttons at the top: **Edit Document** and **Create Specific Recommendation**.

Creating Specific Recommendations

Use the **Create Specific Recommendation** button from within the Finding document to open a Recommendation form. Add a Recommendation Number, enter the finding title, and enter the detailed recommendation in the space provided. Use the **Submit** button to close and save the recommendation. You will return to the Finding document. If you need to enter another recommendation for this finding, then select **Create Specific Recommendation** and repeat the process until all the recommendations for this finding are entered. When you have completed entering all of the recommendations, then select **Assessments Chapter** to continue loading additional findings and recommendations, or to enter the remainder of the sections for the chapter.

Creating a Suggestion

The Suggestions cannot be created until a Chapter section has been entered in PPMAP. In the specific chapter view select **Create Suggestion** and the screen for entering a Suggestion will open. Select section letter D, enter the title of the Suggestion, and enter the description of the Suggestion in the large block. When finished select **Submit**. The **Suggestion** form will be saved and reopen with two new buttons at the top: **Edit Document** and **Create Specific Suggestion**.

Creating Specific Suggestions

Use the **Create Specific Suggestion** button from within the Suggestion document to open a Specific Suggestion form. Add a Specific Suggestion number, enter the Suggestion title, and enter the detailed Specific Suggestion in the space provided. Use the **Submit** button to close and save the Specific Suggestion. You will return to the Suggestion document. If you need to enter another Specific Suggestion for this Suggestion, then select **Create Specific Suggestion** and repeat the process until all the Specific Suggestions for this Suggestion are entered. When you have completed entering all of the Specific Suggestions, then select **Assessments Chapter** to continue loading additional Suggestions, or to enter the remainder of the sections for the chapter.

Creating the Other Item Section

The Other Item cannot be created until a Chapter section has been entered in PPMAP. In the specific chapter view select **Create Other Item** and the screen for entering a Other Item section will open. Select section letter E, enter the title of the Other Item, and enter the description of the Other Item in the large block. When finished select **Submit**. The Other Item section will be saved and you will return to the Cover Letter view. From the **Cover Letter** view you can continue to create new chapters or select **Home** or **Assessments** view to navigate to other sections of PPMAP

Email Notification When Assessment Is Posted

After all sections of the assessment have been posted in PPMAP go to the Cover Letter for that assessment. Select the **Notify Site** button to automatically create an

email to the assessed activity. The email notifies the activity that their assessment has been posted and to commence creating Implementation Status Reports in response to the assessment findings and recommendations.

Working with Implementation Status Reports

All assessed activities are required to provide NAVSUP 02 with Implementation Status Reports (ISR) as their plan of action to correct assessment recommendations. After an activity has added their plan of action to PPMAP, NAVSUP 02 reviews and provides feedback about the ISR to the activity.

Reviewing/Editing Implementation Status Reports

To the review an ISR, select the **Findings** hotspot from the PPMAP Main Navigator. In the Findings view, select the blue twisty to the left of the activity name. Next select the blue twisty next to the cover letter. This will expand the assessment to the chapter view level. To see the findings in a particular chapter, select the blue twisty next to the chapter title. Continue to drill down to lower levels by selecting the appropriate blue twisty next to the findings. Where there is a blue twisty next to a specific recommendation this indicates that an Implementation Status Report has been created.

Note:

A blue twisty pointing to a view indicates there is another document attached to the “parent”. Clicking on the blue twisty causes the blue twisty to point downward and the “child” document opens.

The completed ISR gives the PPMAP Team a couple of options. You can select the **Edit Document** button at the top of screen to change to Edit mode. This will allow the form to be reviewed and PPMAP team to select programmed responses to the ISR. Scroll down to the PPMAP Team section of the form and select one of the Concurrence Status radio buttons: **Concur**, **Do Not Concur**, or **Partially Concur** to indicate the acceptability of the Plan of Action.

The status of required actions is tracked by selection of a radio button to indicate completion. If the plan of action is still in progress, select the **Not Completed** Radio Button. Return to the ISR for final adjudication and use the **Completed** Status radio button to indicate when all corrective action has been satisfactorily completed. When the Concurrence Status and Completion Status is finalized, select **Submit** to save and close the ISR.

Note:

In the **Assessments** view the “Implementation Status Report” line will indicate **Completed** or **Not Completed**. This allows users to scroll through an assessment’s contents without opening each ISR to see the status.

PPMAP Team Only Comments

Another selection on the ISR, viewable only to the PPMAP Team, is the **PPMAP team only** form. This form allows PPMAP Team members to discuss an ISR and agree on the PPMAP Team response. This form is visible only to PPMAP Team members. To generate these private comments you must first navigate to the ISR being discussed. From the ISR click the **Create PPMAP Team Only Comment** button to open the form. The system documents the author of the comment and provides free form text fields in which a summary and applicable comments may be entered. When finished, select the **Submit** button. You will return to the ISR.

Suggestions

Assessed activities have the ability to provide feedback for actions taken in response to

PPMAP Suggestions. To view the feedback forms select **Suggestions** from the Navigator pane. Where there is a blue twisty next to a Specific Suggestion form that indicates a Suggestions Feedback form has been submitted.

Responding to Suggestion Feedback

To respond to a suggestion feedback form select **Create Response** and a response form will open. Enter the key thought and detailed response then select **Submit**. You will return to the Assessments View.

Note:

PPMAP forms contain a section for attaching files. This section is identified by the **Browse** button with a blank box to the left near the bottom of the form. Files resident on the users hard drive or on a floppy disk can be attached by clicking on the browse button, navigating to the drive/directory/folder containing the file and selecting the file.

Management (Mgt) Initiatives

This section is presently inactive. However, all of the functionality is present to add management initiatives if desired.

Adding Management Initiatives

To add management initiatives to PPMAP, use the **Mgt Initiatives** hotspot from the PPMAP Main Navigator to navigate to the Mgt Initiatives view. Select the **Create New Management Initiative** button to open a Mgt Initiatives form. Type an Initiative Title; type in the name of the activity, select an assessment area from the pull down menu, and enter the specifics of the initiative. When finished select **Submit**. You will then see the initiative you just entered in the saved mode. You can then proceed using the navigator buttons at the top of the form. Or if you need to make corrections to you input, select **Edit Document**.

Guidance

The **Guidance** section provides space for posting PPMAP related policy. There is the ability to create “Guidance” or to create “Instructions”. These documents can be created directly on-line or be pasted in from an existing soft copy of a document. New Guidance documents are built in sections. First you create the Guidance form, and then you create the Guidance sections and sub-sections. After **Guidance** has been posted in PPMAP the Activities have the ability to provide comments on its contents.

Creating Guidance Forms

To generate a new guidance form, select **Guidance** from the main navigator. Then select the **Create Guidance Form** button from the **Guidance** view. Identify the Guidance form Title, and add the applicable document text in the space provided. When the form is complete, select **Submit** to close. You will return to the **Guidance** view. Select the **Guidance** form you just created to continue creating the sections of the new **Guidance**.

Creating Guidance Sections

A Guidance Section can only be created after a new **Guidance** form has been entered in PPMAP. Open the new **Guidance** form and select **Create Section**. Enter the section number, section title, and the text for the section. When all information is entered select **Submit**. You will return to the **Guidance** section.

Adding Subsections

To generate a **Guidance** Subsection, a **Guidance** form and **Guidance** Section must first be created. At the **Guidance** view open the section requiring a subsection. A new subsection form will open. Enter the subsection number, title, and text. When all information is entered select **Submit**. You will return to the **Guidance** section.

*You can proceed to create sections and subsections until the new **Guidance** document is completed.*

Responding to Guidance Comments and Questions

To respond to comments/questions submitted by the activities, select the **Guidance** hotspot from the PPMAP Main Navigator. Expand the **Guidance** section to display the entire document, by selecting **Expand**. Locate and open the desired comment. Select the **Edit Document** to open the comment/question form in the Edit mode. When in Edit mode, add your response to the *Response* section. When finished, select **Submit**.

Creating Instruction Forms

To generate a new instruction form, select the **Guidance** hotspot from the PPMAP Main Navigator. From the Guidance navigator, select the **Create Instruction Form** button located at the top of the screen. Add the Instruction Title in the form, and type

or paste the applicable information in the available free form text field. When finished, select **Submit**.

PPMAP Admin Section

The PPMAP Admin Section contains the: Site Mailing List for adding and deleting people to receive auto emails; Archiving Checklist for archiving checklist responses and dialog; Archive for retrieving archived checklist information; and Signature Files for changing to “electronic” bitmap signature used to authenticate pre-assessment letters and the assessment cover letter.

Site Mailing List

The PPMAP coordinator has the ability to select who will receive automatically generated emails at each activity. Emails are automatically generated when posting the pre-assessment letter, the assessment report and when the estimated completion date for an Implementation Status report is reached. The **Site Mailing List** is the default view when you open the PPMAP Admin Section. To create a new mailing list select **Create Mailing List**, then in the form select the activity and enter the email addresses of all the people in the activity who are to receive auto email notifications. When all of the information is entered, select **Submit**.

To add new names to an existing mailing list, select the mailing list to be modified from the **Site Mailing List** view, and then select **Edit Document**. Add or delete the email addresses, then select **Submit**.

To delete a mailing list, select the mailing list to be deleted from the **Site Mailing List** view, then select **Delete Document** and the mailing list will be deleted.

Archiving Checklist Responses

There is a need to archive checklist responses for future reference. Archiving the responses keeps the current checklist response view free of checklists for assessments that have been completed.

To archive checklist responses, select the **Archiving Checklists** hot spot in the PPMAP Admin Section. From the pull down menus, select the name of the activity to be sent to archive, and then select the year, save by selecting **Submit**. The checklist responses for the activity selected will be saved in a separate archive database.

Viewing Archived Checklist Responses

To view an archived checklist, select the **Archive** hot spot from the PPMAP Admin Section. The screen will change and there will be a new set of navigators to use to find the checklist responses. If you are looking for the checklist responses from a specific command, the select “Responses by Type”. Other navigators allow you to look for

responses by date, and by name. The archive also contains placeholders for archived checklist questions.

Signature Files

The **Signature Files** contains a list of the signatures of NAVSUP 02 personnel authorized to sign PPMAP reports electronically. To view the list of signatures, select **Signature Files** hot spot from the Admin Section. The signatures are bitmap images of the actual signature of the authorizing official. To add a signature, contact the PPMAP support personnel. They will scan the signature of the new authorizing official and add it to the **Signature Files**.

Conference

The conference application allows users to do teaming, project discussion, and task management on the web. It was created so that PPMAP users can create teams and hold discussions about almost any area affecting PPMAP. Each user can create his/her own conference, and pick team members, who are the only people that can participate in a discussion for that conference. This application also allows team members to create discussion documents and enter items into a calendar. Documents created in a particular conference cannot be seen by anyone who is not a member of the same conference.

To use **Conferencing** select the **Conferencing** hotspot from the PPMAP Main Navigator. The **Conferencing** section opens to a help screen. Select the clasped hands in the upper right corner to continue on to **Conferencing**.

Creating a New Conference

Conferencing opens to the “by Conference” view. To create a new conference, first go to the all conferences view by selecting “Conferences”. A list of all existing conferences will appear. To create a new conference, select the **Create New Conference** button at the top left of the **Conferencing** screen. A new conference form will open. Fill in the conference name and description. Next select the members of the conference. Only persons showing in the list can be included in a conference. The list shows all the people authorized PPMAP Internet access. After selecting members for the conference, select a conference editor. Chances are this person will be the person who is creating the conference. The conference editor is the only person who can edit the conference document. Lastly, you may enter a list of conference topics. This is not required. When finished completing the conference form, select **Submit**.

Creating A New Discussion

After creating a conference, you can then create a discussion. Select the “By Conference” or “By Date” hot spot. Select the **Create New Document** button at the top left of the view. A new discussion form will open. First enter the topic. You can enter a new topic or select one from the topic list. Select if you want the discussion to be marked in the **Conferencing** calendar. If you want the discussion to appear on a date other than the date you are creating the discussion, select yes, then enter the date in the “date to post in calendar” area. Select the conference for the new discussion.

Note:

When creating a new discussion document, only members of the parent conference can participate. If you want to include everyone with PPMAP access in a discussion, then select the all users conference.

After selecting the conference group, then choose the type of communication. A “discussion” document is literally what it says...a means to have a discussion about a particular question, idea, problem, etc. Next select a discussion title and enter the message/discussion specifics. If desired, you can attach a file by using the “Browse” button and selecting the file to be attached from your computer. Select **Submit** to save the new document. An automatically generated email will be sent to all of the members of the conference alerting them that a new discussion has been started.

When the new discussion document is submitted an automatically generated email will be sent to each person in the conference alerting him or her to the new discussion item.

Creating a Personal or Broadcast Message

Select the **Create New Document** button from the “By Conference” or “By Date” views. Complete the form as shown in the previous section. To create a personal or broadcast message select the appropriate item from the “Type of Communication” menu. A “broadcast message” is used to send a message to people in a conference. A “personal message” goes to one individual. If you select “personal message” you will be prompted to select the name of the person to receive the message in a “Message is direct to” block.

Viewing Conference Documents

Conference discussion documents can be viewed in several ways. The primary way of viewing a discussion document is to go to the “By Conference” view, locate a particular conference, and then select the discussion document in that conference that you want to view. You can also navigate to discussion documents in the “By Date” view.

To view a personal or broadcast document you must go to the “mailbox” view.

Responding to a Discussion or Personal Document

In the “By conference view” locate the conference. When you locate the conference and scroll to the document you want to read, click on the document. The discussion document will open. To create a response or add to the discussion select the **Create Response** button at the top of the discussion form. Complete the required information, attach a files if desired, then select **Submit**. Your response form will reside underneath the original discussion document.

Similarly, to respond to a personal message, go to the “mailbox” view. Locate your name and the message. Click on the message to open it. Select **Create Response** button at the top of the personal message form. Complete the required information, attach files if desired, the select **Submit**.

Personal Profiles

The personal profiles area shows the names and email addresses of all authorized PPMAP users. It is important that the personal profile contains an individual's email address, or they will not receive new discussion documents or personal message notification.

Appendix

A

Internet Basics

The World Wide Web

The Internet is a collection of computer networks that connect millions of computers across the globe. The World Wide Web (WWW) is a component of the Internet that consists of both client and server computers that manage a network of web pages. Client computers use browsers, such as Netscape Navigator or Microsoft Internet Explorer, to view these pages. Server computers use server software to maintain pages for clients to view. Through the use of the Lotus Notes Domino server, it is possible for PPMAP users to participate in the process interactively via the WWW.

Uniform Resource Locators

The WWW uses Uniform Resource Locators (URLs) to keep each page distinct in a world of multimedia pages. Each page has its own unique URL. To enter a URL, type the URL directly into the location text field. By entering a page's URL, the browser can bring you to the specified page. An example of a URL is: <http://www.quads.navsup.navy.mil>.

Links to Pages

A hyperlink, or simply "link," is a connection from one web page to another. You may find links by looking for words with color, underlining, or both. Images and buttons with colored borders also serve as links. To use a link, point the mouse cursor directly over the link and single click. This transfers page content from a server location to your location. There are two different types of links. An unfollowed link is a connection to a page that you have not yet viewed. By default, unfollowed links are blue. A followed link is a connection to a page that you have previously viewed. By default, followed links are violet.

Toolbars

Netscape Navigation Toolbar

Users accessing the PPMAP database with the Netscape Navigator browser can use the Navigation toolbar. The Navigation toolbar consists of a set of buttons that, when pressed, will execute common file menu commands. An illustration of the Netscape Navigation toolbar appears at Figure A.1, followed by a description of the buttons that will prove useful throughout the assessment process.

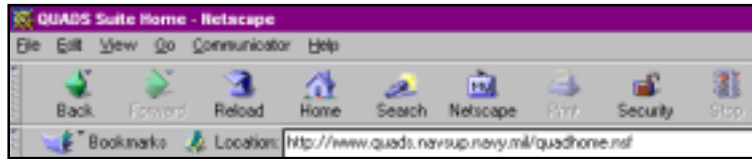


Figure A.1 Netscape Navigation Toolbar



Back. Displays the previous web page visited.



Forward. After you have pressed the [Back] button, pressing the [Forward] button will bring the screen to the next sequential web page in the history list.



Reload. Reloads the current page with updated information from the server, reflecting any changes or additions that have been made since the last original loading.



Home. Displays the Homepage designated by the user; the default is the Netscape Homepage.



Print. Prints the current selection.

Bookmarks. Bookmarks are a convenient means of retrieving pages whose URLs you have specified. Generally, these are pages that you visit on a regular basis, such as the QUADS Homepage. To add a web page as a bookmark, pull down the **Bookmark** menu from the Navigation toolbar, and highlight [Add Bookmark]. This adds the current page to the bookmark menu. To access a bookmark, simply pull down the Bookmark menu, highlight the desired bookmark, and single click.

Microsoft Internet Explorer Browser

Internet Explorer users have access to the Explorer toolbar, depicted in Figure A.2. Many of the functions discussed above also apply to this browser. The key differences are discussed below.

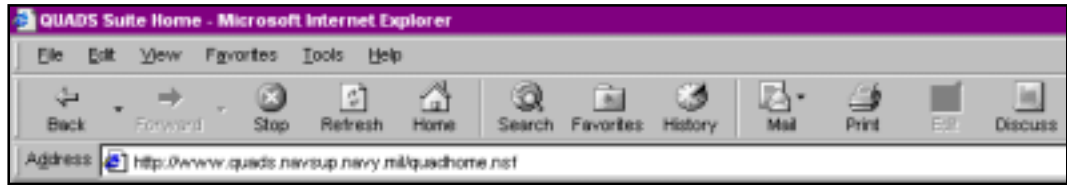


Figure A.2 Microsoft Internet Explorer Toolbar



Refresh. Refreshes the current page with updated information from the central server.



Favorites. The **Favorites** Menu allows you to keep most-used web pages handy. Simply click [**Add to Favorites**] or depress the [**Favorites**] button to add the current web page.

Other Browsers

Similar features are available in other browsers. Generally, the [**Back**], [**Forward**], [**Home**], [**Reload**], and [**Print**] functions are provided by the browser software package. Contact your browser software company for details.

Printing

To print a document in PPMAP, click the [**Print**] button from the browser toolbar while viewing the desired document or view. When the dialog box appears, select the desired print range. Selecting the print range "All" tells the browser to print the entire selection, even if it is not visible in its entirety on the current screen. It may be necessary to scroll down to see how long the current selection is prior to printing. Click the [**OK**] button at the bottom of the dialog box to submit the print job.

The Process of Reloading

Internet users must periodically perform a process of reloading or refreshing their files. To do so, click the Reload or Refresh button located on the browser toolbar at the top of the screen. This process refreshes the current page with updated information from the server, reflecting any changes made since the last original loading. If there has been a change, the updated page is retrieved from the network server.